

Steps to Certification for CM I


Please review the **NEW** Case Management Rules:

- ☐ [Chapter 50 Standards and Criteria for Certified Behavioral Health Case Managers](#)
- ☐ These will provide you with the qualifications, prerequisites, and timelines for application and certification
- ☐ Please review them carefully as there have been critical changes

You need an NPI (National Provider Identification) Number:

- Everyone needs to get a National Provider Identification Number before you begin
- Use this link [National Provider Identification \(NPI Number\)](#) to apply for your number
 - **PLEASE MAKE NOTE: YOU WILL NEED TO REFER TO THE FOLLOWING DURING YOUR NPI APPLICATION PROCESS**
 - Add Taxonomy Code, click next
 - Select from the drop-down menu “171M00000X- Case Management/Care Coordinator” click Save
 - Check (the dot) left to Case Management/Care Coordinator, click on next and complete the rest of the application
- If you already have an NPI number, please use that number

Complete the Online Application:

- **DO NOT CREATE ANOTHER ACCOUNT IF YOU ALREADY HAVE ONE**
- **THIS WILL ONLY DELAY PROCESSING OF YOUR APPLICATION**
- **FOR ASSISTANCE CONTACT THE HELP DESK AT (405) 248-9000 Option 0**
- [Access to the online system](#) (click here for new accounts)
 - Create a user id and password.
 - **BE SURE TO SAVE YOUR USER NAME AND PASSWORD**
 - You will need it throughout this process and each year to complete your renewal
 - For assistance with your user name and password, please contact the help desk at 405-248-9000 Option 0.
- [Case Management On-Line Application & Pay Fees online](#) (click here for existing accounts)
 - Choose this  "Registration" icon.
 - Complete each tab with your information.
 - Everyone is required to pay the \$25.00 Initial Application Fee **ONLINE**.
 - **ALL FEES MUST BE PAID ONLINE ONLY**
 - Look for “**PAY BILLS**” Button in the Upper Right-hand corner of your account.
 - Please print your receipt to attach to your application documents.
 - ****ODMHSAS employees are exempt from the initial fee of \$25.00.**
 - Use the Submit Button, and the “Application Inventory Page” will appear.
 - Print this “Application Inventory Page.”
 - Once you hit the submit button, you only have six (6) months of your initial application date to complete the certification process.
 - If you do not complete the certification process within six (6) months, of your initial application date, your application will expire and
 - You will be required to start the entire application process all over from the beginning and
 - No refunds or credits will be given for any fees

Mail your application to us:

- Once you have completed your online application, print the Application Inventory Form, attach the following documents, and mail to the address below:

- Application Inventory Form with Signature
- Current Oklahoma State Bureau of Investigation criminal history report
- Printed receipt showing online payment of Application Fee \$25 or Recertification Fee \$15 (if applicable) **(ONLINE PAYMENTS ONLY – NO CHECKS – NO MONEY ORDERS)** (No Refunds)
 - New Application Fee: \$25.00 – must be paid online- print your receipt
- Official College or University Transcript showing the degree and the conferred (graduation) date
 - If you have less than 60 college credit hours, you are required to include your official transcript and a letter from employer/agency, on company letterhead, documenting at least 36 months of verifiable experience working directly with Mental Health or Substance Abuse consumers. It should include dates of employment and description of duties during applicable dates.
- Official High School Transcript or GED (if no college or university transcript)
 - Verification of Experience (if applicable) - If you have a high school diploma or GED, you are required to include your official transcript or GED and a letter from employer/agency, on company letterhead, documenting at least 36 months of verifiable experience working directly with Mental Health or Substance Abuse consumers. It should include dates of employment and description of duties during applicable dates.
- **Email Completed Application to** Ramona.gregory@odmhsas.org
 - If you do not complete the certification process within six (6) months, of your initial application date, your application will expire and
 - You will be required to start the entire application process all over from the beginning and
 - No refunds or credits will be given for any fees

Application Approval Process:

- Applications will be reviewed in detail on a first-come, first-serve basis
- Applicants who send in incomplete applications or applications needing corrections will be notified by e-mail of the needed corrections.
- If your application needs corrections, your application may be returned to you by mail either to the home address or place of employment listed in your online account.

Pay Face to Face Training Fee

- Once we approve your application, you will receive an e-mail:
- Log back into your account and pay your \$50.00 Face to Face Training Fees
- All Payments must be made online.
- ****ODMHSAS employees are exempt from Face to Face Training Fees.**
- If you do not complete the certification process within six (6) months, of your initial application date, your application will expire and
- You will be required to start the entire application process all over from the beginning and
- No refunds or credits will be given for any fees

Register for Face to Face Case Management Training – For all scenarios

- Please visit our [website](#) to review the [Case Management Training Information & Schedule](#).
- Please select a first and second choice of dates that you would prefer to attend and
- Send Ramona Ramona.Gregory@odmhsas.org an e-mail to let her know what your preferences are.
- Ramona will make every attempt to give you your choices, but the classes fill up fast, so she may just have to

register you for the next available training.

- ☐ Ramona will send you a Registration Confirmation E-mail with more information regarding the training.
- ☐ At the end of the training, you will be given your Official Exam Approval Document.
- ☐ If you do not complete the certification process within six (6) months, of your initial application date, your application will expire and
- ☐ You will be required to start the entire application process all over from the beginning and
- ☐ No refunds or credits will be given for any fees

Schedule your Exam:

- ☐ [Career Tech Exam Information](#) this is a safe link
- ☐ Contact the Career Tech site of your choice to schedule your exam
- ☐ Career Tech sites charge a \$45.00 fee.
- ☐ The testing protocol requires an Oklahoma State issued identification, pre-scheduling of Exam, Official Exam Document at all exam sites.
- ☐ Be sure to take your exam as soon as possible. Your Exam Approval Document has an expiration date on it and
- ☐ If you do not complete the certification process within six (6) months, of your initial application date, your application will expire and
- ☐ You will be required to start the entire application process all over from the beginning and

Prepare for and take your exam:


- The Online Training and the Face to Face Training will prepare you for the exam, but if you feel you need additional information, we recommend reading the following material:
 - *The Strengths Model: A Recovery-Oriented Approach to Mental Health Services*; 3rd edition; Charles A. Rapp & Richard J. Goesha
 - [A portion of The Strengths Model: A Recovery-Oriented Approach to Mental Health Services is on Google Books for free](#)
 - [Barnes and Noble](#)
 - [Amazon.com](#)
 - [“TIP 27: Comprehensive Case Management for Substance Abuse Treatment”](#)
- After you finish reading the materials, please contact the career tech exam site of your choice to schedule a time to complete the web-based exam.
 - Go to [Exam Site Information](#) for a list of testing sites and contact information.
 - You must call ahead and schedule an appointment to take the exam.
 - You will not be allowed to test without an appointment.
 - The Exam fee you pay directly to the Career Tech is \$35.00. Please contact the Career Tech for the types of payment they accept.
 - Bring your Exam Approval Document with you to the testing site,
 - Bring your driver's license or state-issued id with you to the testing site.
 - Applicants must contact the test site to find out what forms of payment are accepted.
 - Exam letters will not be sent to the testing site.
 - If you do not complete the certification process within six (6) months, of your initial application date, your application will expire and
 - You will be required to start the entire application process all over from the beginning and
 - No refunds or credits will be given for any fees

Successful Exam Completion

- Upon successful exam completion, you need to email two documents to Ramona
 - Coaching Report (Exam results).
 - Print off this [Verification of Employment Form](#)
 - Take this form to your employer for them to complete. Your employer must be a contracted agency with OHCA to provide Case Management Services.
 - Email your Coaching Report (exam results) and Verification of Employment form to Ramona.gregory@odmhsas BOTH DOCUMENTS MUST BE SENT TOGETHER

- You cannot complete your Case Management Certification unless you are employed with a contracted agency.
- If you cannot provide a **Verification of Employment Form**, within six (6) months, your application will expire and
- If you do not complete the certification process within six (6) months, of your initial application date, your application will expire and
- You will be required to start the entire application process all over from the beginning and
- No refunds or credits will be given for any fees
- You will be notified when to print off your certificate when you have successfully completed the Case Management Certification process.

Print Certificate

- Sign in to Access Control through Secure Access Icon 
- Click on Registration Icon
- Select Behavioral Health Case Management
- Print Certificate button will appear next to Advance to Registration
- Print your certificate (make sure your Pop Up Blocker is turned off)
- Please make a note of your Certification Expiration Date on your certificate and make sure to familiarize yourself with the Recertification Process as outlined in the [Chapter 50 Standards and Criteria for Certified Behavioral Health Case Managers](#)
- Please visit our [Behavioral Health Case Management](#) website for more information regarding the Recertification Process.

You cannot bill for Case Management Services until you can print off your certificate.